## **Alison Miller Special Needs Trust**

Atty

Denning, Stephen M. (for Matthew Miller – Successor Trustee)
Probate Status Hearing Re: Filing Final Distribution

DOD: 01/08/2013	MATTHEW MILLER, Successor Trustee.	NEEDS/PROBLEMS/COMMENTS:
	Status Report filed 09/30/2013 by Attorney Stephen M.	
	<b>Denning</b> states a status hearing on the filing of the	
Comb from	eighth and final account and report of the trustee of	
Cont. from	the Special Needs Trust is scheduled for 10/11/2013.	
Aff.Sub.Wit.		
Verified	Pursuant to paragraph 11 of the Special Needs Trust,	
Inventory	the trustee is required, among other things, to give the	
PTC Not Creed	notice required by Probate Code §3605(c) on the	
Not.Cred.	death of the beneficiary. Section 3605(c) provides in	
Notice of Hrg	part as follows:	
Aff.Mail	"(c) At the death of the special needs trust	
Aff.Pub.	beneficiary or on termination of the trust, the	
Sp.Ntc.	trustee shall give notice of the beneficiary's	
Pers.Serv.	death or the trust termination, in the manner	
Conf.	provided in Section 1215, to all of the following:	
Screen	"(1) The State Department of Health Care	
Letters	Services, the State Department of State	
Duties/Supp	Hospitals, and the State Department of	
Objections	Developmental Services, addressed to the	
Video	director of that department at the Sacramento	
Receipt	office of the director"	
CI Report		
9202	Probate Code § 3605(e) provides that the department	
Order	has four months after notice is given in which to make	Dayfayya dha mil V
Aff. Posting	a claim against the trustee.	Reviewed by: LV
Status Rpt UCCJEA	The State Department of Health Care Services has filed	Reviewed on: 10/03/2013 Updates:
Citation	a claim with the trustee. However, neither the State	Recommendation:
FTB Notice	Department of State Hospitals nor the State	File 1 - Miller
	Department of Developmental Services has yet filed	
	claims, although both of these departments have until	
	October 14, 2013, in which to do so.	
	Based on the foregoing, the trustee respectfully	
	requests a 45 day continuance of the status hearing	
	scheduled for 10/11/213, subject to being taken off	
	calendar on the filing of the trustee's eighth and final	
	account and report.	

Cont. from	Examiner note for this matter will not be posted.
Aff.Sub.Wit.	•
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf. Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report 9202	
Order	
Aff. Posting	Reviewed by:
Status Rpt	Reviewed on:
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 2 - Pellegrini
	<u> </u>

2

Saevig, Roger A (for Administrator Joy J. Saevig)

## Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 4/29/2001	JOY J. SAEVIG was appointed as	NEEDS/PROBLEMS/COMMENTS:
	Administrator with Will Annexed, with Limited	
	IAEA authority and without bond on	Continued from 9/6/2013. Minute order
	11/30/2001.	indicates there were no appearances
Cont. from 090613	Letters issued on 11/30/2001.	and set an Order to Show Cause. See page 3B.
Aff.Sub.Wit.		
Verified	Inventory and appraisal was due on 3/30/2002.	Need Inventory and Appraisal and     First Account and/or Petition for Final
Inventory	3/30/2002.	Distribution or current written status
PTC	First account or petition for final distribution	report pursuant to Local Rule 7.5
Not.Cred.	was due 11/30/2002.	which states in all matters set for
Notice of		status hearing verified status reports
Hrg	Notice of Setting Status Hearing was mailed	must be filed no later than 10 days
Aff.Mail	to Attorney Roger A. Saevig on 7/25/2013.	before the hearing. Status Reports
Aff.Pub.		must comply with the applicable
Sp.Ntc.		code requirements. Notice of the status hearing, together with a copy
Pers.Serv.		of the Status Report shall be served
Conf.		on all necessary parties.
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 10/3/2013
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 3A - Hendrickson

**3A** 

Saevig, Roger A (for Administrator Joy J. Saevig)

Order to Show Cause Re: Failure to Appear (As to Roger Saevig and Joy Saevig)

DOD: 4/29/2001	JOY J. SAEVIG was appointed as	NEEDS/PROBLEMS/COMMENTS:
2021 1/21/2001	Administrator with Will Annexed, with Limited	
	IAEA authority and without bond on	
	11/30/2001.	
Cont. from		
	Letters issued on 11/30/2001.	
Aff.Sub.Wit.	Inventory and appraisal year due on	
Verified	Inventory and appraisal was due on 3/30/2002.	
Inventory	3/30/2002.	
PTC	First account or petition for final distribution	
Not.Cred.	was due 11/30/2002.	
Notice of		
Hrg	Notice of Setting Status Hearing was mailed	
Aff.Mail	to Attorney Roger A. Saevig on 7/25/2013.	
Aff.Pub.	Minute Order dated 0///12 states the Court	
Sp.Ntc.	Minute Order dated 9/6/13 states the Court sets the matter for an Order to Show Cause	
Pers.Serv.	regarding Joy Saevig and Roger Saevig's	
Conf.	failure to appear. Joy Saevig and Roger	
Screen	Saevig to be personally present.	
Letters		
Duties/Supp	A copy of the Order to Show Cause, the	
Objections	minute order and the examiner notes was	
Video	mailed to both Joy Saevig and Roger Saevig on 9/20/13.	
Receipt	0117/20/10.	
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 10/3/13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 3B - Hendrickson

Atty

Fanucchi, Edward L. (for Malkia N. Dillard – daughter/Administrator)

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

DOD: 10/1	1/04	MALKIA N. DILLARD, daughter, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Administrator with full IAEA and without bond on	CONTINUED FROM CO /C/ /CO
		11/03/06. Letters of Administration were issued on	CONTINUED FROM 09/06/13
		11/03/06.	Need Inventory & Appraisal.
Cont. from	090613	Notice of Status Hearing filed 07/17/13 set this	τι τισεα πινειποιγ α Αρριακαι.
Aff.Suk	o.Wit.	matter for status on 09/06/13.	2. Need Accounting/Report on
Verifie	d		Waiver of Account and
Invent	ory	Status Report filed 09/05/13 states: Estate assets	Petition for Final Distribution.
PTC		were under \$43,000.00. The assets of the	
Not.Cr	red.	decedent consisted of bank accounts and an	Note to Judge:
	of Hrg	investment account which were transferred prior to the decedent's death to either joint tenancy or	Administrator filed an Ex Parte
Aff.Ma		solely in the name of a local attorney. One of	Petition to Terminate Probate
Aff.Puk		those assets involved the sale of the stock which	Proceedings and Set Aside Estate
Sp.Ntc		resulted in the IRS assessing more than \$25,000.00 in	Less than \$100,000.00 on 08/08/13.
Pers.Se		taxes which was paid by said attorney from the	The Court denied the Ex Parte
	Screen	sale of said stock. The assets were the subject of a	Petition on 08/29/13.
Letters		lawsuit by the Administrator against said attorney which resulted in a settlement and payment of the	
		assets in cash directly to decedent's daughter, as	
Duties		well as a settlement of \$3,000.00 by said	
Objec		attomey/defendant. A claim and documentation	
Video		was provided to the IRS by counsel herein which	
Receip		resulted in the refund of the taxes plus interest	
CI Rep	OOIT	totaling approximately \$29,000.00 which was paid	
9202		directly to the daughter by the IRS. Since assets were paid in cash directly to the daughter in the	
Order		settlement, the Administrator sought a termination	Povious d by a IE
Aff. Po		of the probate proceeding which was denied by	Reviewed by: JF
Status UCCJE		the Court on 08/29/13. The Administrator paid the	Reviewed on: 10/04/13 Updates:
Citatio		sole Creditor's Claim filed in the estate from her	Recommendation:
FTB No		personal funds. Since the assets of the decedent	File 4 - Gainous
LIBINO		were paid directly to the daughter in the	
		settlement of the lawsuit and by the IRS as the decedent's sole heir, termination of the probate	
		proceedings is sought without necessity of an	
		Inventory & Appraisal and formal Waiver of	
		Accounting and Petition for Final Distribution.	

Fanucchi, Edward L. (for Elizabeth Felix – daughter/Administrator)

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

DOD: 09/05/06	ELIZABETH FELIX, daughter, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Administrator with full IAEA and without bond on	CONTINUED FROM 00 /04 /12
	03/20/07. Letters of Administration were issued on 03/21/07.	CONTINUED FROM 09/06/13
	03/21/07.	Need Account/Report on
Cont. from 090613	Final Inventory & Appraisal filed 04/13/07 -	Waiver of Account and
Aff.Sub.Wit.	\$160,000.00	Petition for Final Distribution.
Verified		
Inventory	Notice of Status Hearing filed 07/17/13 set this	
PTC	matter for status on 09/06/13.	
Not.Cred.	Status Report filed 08/14/13 states: The only asset	
Notice of Hrg	of the estate was real property located at 1924 S.	
Aff.Mail	Teilman, Fresno. There were no funds in the estate	
Aff.Pub.	for expenses of administration; costs to date have	
Sp.Ntc.	been advanced by the Administrator's attorney.  The heirs had no funds to pay the annual	
Pers.Serv.	property taxes, upkeep or maintenance on the	
Conf. Screen	real property. The property was sold by the	
Letters	County of Fresno in March 2013 for non-payment	
Duties/Supp	of property taxes. The excess sale proceeds were	
Objections	\$32,379.78. A claim for excess proceeds was sent to the Fresno County Tax Collector on 06/05/13. It	
Video	is unknown when the proceeds will be received	
Receipt	by the estate per the tax collector's office. The	
CI Report	Department of Health Care Services has liens for	
9202	Medi-Cal advances for the decedent and her	
Order	predeceased spouse against the estate in the	
Aff. Posting	amount of \$69,827.33. After payment of attorney's fees, costs of administration, and	Reviewed by: JF
Status Rpt	statutory commission, the balance of the excess	<b>Reviewed on:</b> 10/04/13
UCCJEA	sale proceeds will be paid to the Department of	Updates:
Citation	Health Care Services. Upon receipt of the funds	Recommendation:
FTB Notice	from the County of Fresno, the final accounting	File 5 – Estrada
	and petition for final distribution will be prepared	
	and filed.	

Atty

Bagdasarian, Gary G. (for Donald Lewis McDaniels – Conservatee – Petitioner)
Status Hearing Re: Filing of a Final Account by Wells Fargo Bank

Age: 47		BRUCE BICKEL was appointed Successor	NEEDS/PROBLEMS/COMMENTS:
		Conservator of the Estate with bond in the	
		amount of \$280,000.00, and securities	Need current written status report
		transferred to a blocked account on 08/08/2013.	pursuant to Local Rule 7.5 which states in all matters set for status
Cont. from		00/00/2013.	hearing verified status reports must be
Aff.Sub.	Wit.	WELLS FARGO BANK, NA, was the former	filed no later than 10 days before the
Verified		Conservator of the Estate.	hearing. Status Reports must comply
Invento	ry	Bond filed 08/16/2013 in the amount of	with the applicable code requirements. Notice of the status
PTC		\$280,000.00.	hearing, together with a copy of the
Not.Cre	ed.	<del>\$250,000.00.</del>	Status Report shall be served on all
Notice o	of	Letters issued on 08/16/2013.	necessary parties.
Hrg			
Aff.Mail		Minute Order of 08/08/2013 set this matter for	
Aff.Pub.		hearing for filing of a final account by Wells Fargo Bank, NA, covering from the close of	
Sp.Ntc.		the last account period 9-1-12 through	
Pers.Ser	٧.	current.	
Conf.			
Screen			
Letters			
Duties/S			
Objection	ons		
Video			
Receipt			
CI Repo	ort		
9202			
Order			
Aff. Post			Reviewed by: LV
Status R	•		Reviewed on: 10/03/2013
UCCJEA			Updates:
Citation			Recommendation:
FTB Notic	ice		File 6B - McDaniels

Franco, Paul C. (for Deborah Lynn Kamine – Executor)

Probate Status Hearing Re: (1) Failure to File Inventory and Appraisal; (2) Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

DOD: 01/17/2011	<b>DEBORAH LYNN KAMINE,</b> daughter, was	NEEDS/PROBLEMS/COMMENTS:
	appointed Executor with full IAEA authority	
	without bond on 05/12/2011.	Need current written status report
		pursuant to Local Rule 7.5 which
Cont. from	Letters issued 05/12/2011.	states in all matters set for status
		hearing verified status reports must be
Aff.Sub.Wit.	Inventory and Appraisal was due	filed no later than 10 days before the
Verified	09/12/2011.	hearing. Status Reports must comply with the applicable code
Inventory	First Account or Petition for Final Distribution	requirements. Notice of the status
PTC	was due 05/12/2012.	hearing, together with a copy of the
Not.Cred.		Status Report shall be served on all
Notice of	Notice of Status Hearing was mailed to Paul	necessary parties.
Hrg	C. Franco on 08/08/2013.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		<b>Reviewed on:</b> 10/03/2013
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 7 - Blankenship

Geraldine E. Lowe (Estate)
Fanucchi, Edward L. (for Lawrence M. Lowe – Executor)
Status on Petition Filed By Successor

Con from 072613  Aff.Sub.Wit.  Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc.	X	LAWRENCE M. LOWE, Son, was appointed Executor with Full IAEA without bond and Letters issued on 6-2-11.  Inventory and Appraisal filed 3-6-13 reflected a total estate value of \$765,111.17. (Note: Supplemental I&A indicates an additional \$6,000.00 for a total estate value of \$771,111.17)  Upon filing of the I&A and review of the file, it was determined that a first account or petition for final distribution was due; therefore, on 3-18-13, the Court set a status hearing for failure to file a first account or petition for final distribution for 6-28-13 and sent notice to Attorney Fanucchi.	NEEDS/PROBLEMS/ COMMENTS:  CONTINUED FROM 07/26/13 Minute order from 07/26/13 states: Counsel advises the Court that the status statement has been filed and the communication difficulties have been cured. Counsel further advises that they are waiting on the final appraisal.  Note: Heirs include: Lawrence M. Lowe (Son and Executor),
Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice	6-2-11	<ul> <li>On 2-12-13, the attorney requested the Executor obtain certain documentation regarding the estate, and on 3-5-13, the attorney requested the Executor send an estate check to pay the probate referee (not yet paid), and on 3-12-13, the attorney again requested the documentation requested on 2-12-13. On 3-20-13, the attorney advised Executor of his presence being required at the 6-28-13 status hearing, and again requested the documentation. However, no response was received.</li> <li>The status report states that the executor advised the decedent's granddaughter that a specific bequest of jewelry to her was stolen from his home; however, the attorney was not advised of this fact until contacted by the granddaughter.</li> <li>There were also specific bequests of \$10,000.00 each to the decedent's two grandchildren which have not been made after procedures under probate code have been followed by counsel.</li> <li>Counsel is unable to prepare a final accounting without the documentation requested, and counsel has had no contact from the executor or response to multiple requests, other than to be advised that he has not been able to obtain, or the bank made a mistake, or other reasons. Cousnel has no information on current status of disbursements, receipts, balances, or location of assets.</li> </ul>	trustee of testamentary trust fbo Sharon Oniwa, (Daughter),  • Dori Ann Kawai and Darold Oniwa (Grandchildren) (specific bequests).  Reviewed by: skc/JF  Reviewed on: 10/04/13  Updates:  Recommendation:  File 2A – Lowe

### 8 Geraldine E. Lowe (Estate)

Case No. 11CEPR00255

#### Page 2

**Minute Order 6-28-13 states:** Mr. Fanucchi informs the Court that Dr. Woo is planning on filing petition to be successor executor. Mr. Lowe is ordered to appear on 7/26/13. Order to show cause issued Re: failure to appear and failure to act as executor. Sanctions of \$1000.00. The Court will consider a surcharge of any loss assets not protected while he has been executor. Set on: 7/26/13 at 9 am in Dept. 303 for: Filing Petition for Successor Executor.

#### Status Report filed 7-22-13 (verified by Mr. Lowe) states:

- Since the prior status report, Executor has contacted counsel, delivered the jewelry mentioned in the will to Jim Bianchi for appraisal, executed a Supplemental I&A, and filed Notices of Proposed Action re transfer of the piano and vehicle, and for distribution of the cash bequests;
- The turmoil in the case and the thoughts about removing the executor have settled down, the Executor is in full compliance with the instructions of his attorney, and the case is moving along swiftly. Executor does not recall any notice to be present at the last hearing, but will be present on 7-26-13.
- As soon as the appraisal on the jewelry is received, a 2<sup>nd</sup> Supplemental I&A will be forwarded to the Probate Referee and filed;
- It is anticipated that the above matters will be completed and final accounting filed within the next month.

Supplemental Inventory & Appraisal filed 07/30/13 - \$55,159.00

Franco, Paul C. (for Mark F. Ellson – Executor)

Probate Status Hearing Re: (1) Failure to File Inventory and Appraisal; (2) Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

DOD: 08/26/2011	MARK F. ELLSON, son, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Executor with full IAEA authority without	
	bond on 03/15/2012.	Need current written status report
	1	pursuant to Local Rule 7.5 which
Cont. from	Letters issued on 03/15/2012.	states in all matters set for status
Aff.Sub.Wit.	Inventory and Appraisal filed on 09/09/2012	hearing verified status reports must be
<del></del>	Inventory and Appraisal filed on 08/02/2013 shows an estate valued at \$321,043.00.	filed no later than 10 days before the hearing. Status Reports must comply
Verified	= 3110443 di 1 631016 valoca di 4021,040.00.	with the applicable code
Inventory	Notice of Status Hearing was mailed to Paul	requirements. Notice of the status
PTC	C. Franco on 08/08/2013.	hearing, together with a copy of the
Not.Cred.		Status Report shall be served on all
Notice of		necessary parties.
Hrg Aff.Mail	4	
	-	
Aff.Pub.	-	
Sp.Ntc.	=	
Pers.Serv.	=	
Conf. Screen		
Letters	4	
	4	
Duties/Supp Objections	-	
Video	4	
Receipt		
Cl Report	╡	
9202	=	
Order	-	
Aff. Posting	1	Reviewed by: LV
Status Rpt	1	Reviewed by: Ev  Reviewed on: 10/03/2013
UCCJEA	1	Updates:
Citation	1	Recommendation:
FTB Notice	1	File 9 - Ellson
		9

Fanucchi, Edward L. (for Will Scott, Jr. – Administrator)
Probate Status Hearing Re: Filing of Inventory and Appraisal

DOD: 10/22/11	WILL SCOπ, JR., surviving spouse, was	NEEDS/PROBLEMS/COMMENTS:
	appointed successor Administrator on	
	02/08/13.	CONTINUED FROM 08/16/13
	╡, ,, ,, ,, ,, ,, ,, ,, ,, ,, ,, ,, ,, ,	Minute Order from 08/16/13 states:
Cont. from 052413,	Letters of Administration were issued on 02/08/13.	Counsel informs the Court that they are
062113, 081613	02/06/13.	trying to determine what if anything is in the estate. Counsel requests a
Aff.Sub.Wit.	Status Report filed 05/17/13 states: Counsel	continuance.
Verified	and the Administrator have not had time to	
	determine what assets remain in the estate	<ol> <li>Need Inventory &amp; Appraisal or</li> </ol>
PTC	and what assets have been determined to	current written status report
Not.Cred.	<ul><li>be joint tenancy property. A continuance is</li><li>requested so that counsel and the</li></ul>	pursuant to Local Rule 7.5, which states: In all matters set
Notice of	Administrator can meet to prepare the	for status hearing, verified
Hrg	Inventory & Appraisal and forward it to the	status reports must be filed no
Aff.Mail	Probate Referee for appraisal and	later than 10 days before the
Aff.Pub.	subsequent filing with the Court.	hearing. Status Reports must
Sp.Ntc.	7	comply with the applicable code requirements. Notice of
Pers.Serv.		the status hearing, together
Conf.		with a copy of the Status
Screen		Report shall be served on all
Letters		necessary parties.
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	_	
Order	_	
Aff. Posting		Reviewed by: JF
Status Rpt		<b>Reviewed on:</b> 10/04/13
UCCJEA		Updates:
Citation	_	Recommendation:
FTB Notice		File 10 – Scott

Thomas, Lanier (for Cynthia Morgan-Gunner – Executor)

Probate Status Hearing Re: Failure to

File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

DOD: 10/08/2011	CYNTHIA MORGAN-GUNNER, spouse, was	NEEDS/PROBLEMS/COMMENTS:
	appointed Executor with full IAEA authority	
	without bond on 03/21/2012.	Need current written status report
	- H - m :   00 /01 /0010	pursuant to Local Rule 7.5 which
Cont. from	Letters issued on 03/21/2012.	states in all matters set for status hearing verified status reports must be
Aff.Sub.Wit.	Inventory and Appraisal filed 08/02/2013	filed no later than 10 days before the
Verified	showing an estate valued at \$321,043.81.	hearing. Status Reports must comply
Inventory		with the applicable code
PTC	Notice of Status Hearing was mailed to	requirements. Notice of the status
Not.Cred.	Lanier Thomas on 08/08/2013.	hearing, together with a copy of the
Notice of		Status Report shall be served on all necessary parties.
Hrg		1.00000017 Politicol.
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		<b>Reviewed on:</b> 10/03/2013
UCCJEA	-	Updates:
Citation		Recommendation:
FTB Notice		File 11 - Gunner
<u> </u>		11

Simonian, Jeffrey D. (for Louis Wayne Wiebe – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 4-4-12	LOUIS WAYNE WIEBE, Son, was appointed	NEEDS/PROBLEMS/COMMENTS:
Cont from 082313  Aff.Sub.Wit.	Executor with Full IAEA without bond and Letters issued on 6-25-12.  On 6-25-13, the Court set this status hearing for the filing of the first account or petition for final distribution.	CONTINUED FROM 08/23/13 Minute Order from 08/23/13 states: No appearances. Matter continued to 10/11/13. Jeffrey Simonian is ordered to be personally present on 10/11/13 if
Verified	distribution.	the first account and petition for final distribution have not been filed.
Inventory		
PTC		Note: a copy of the Minute Order was
Not.Cred.		mailed to Jeffrey Simonian on 08/26/13.
Notice of Hrg		50, 20, 10.
Aff.Mail		Note: 1&A filed 11-27-12 indicates a
Aff.Pub.		total estate value of \$208,915.73 consisting of cash and various real
Pers.Serv.		and personal property.
Conf. Screen		
Letters		Note: There are four (4) separate creditor's claims filed in this estate.
Duties/Supp		creation's claims theatm this estate.
Objections		Need first account or petition for
Video Receipt		final distribution or written status report per local rules.
CI Report		2. Need proof of service of Notice of
9202		Hearing on Wells Fargo Card
Order		Services per Request for Special Notice filed 6-5-12.
Aff. Posting		Reviewed by: skc/JF
Status Rpt		<b>Reviewed on:</b> 10/04/13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 12 - Wiebe

12

Fanucchi, Edward L. (for Jana L. Nelson – Administrator)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

JANA L. NELSON, daughter, was appointed	NEEDS/PROBLEMS/COMMENTS:
• • • • • • • • • • • • • • • • • • • •	
on 07/02/12.	CONTINUED FROM 08/30/13
	Minute Order from 08/30/13 states:
On 10/24/12, an Order Granting Petition to	Counsel advises the Court that the hold-
Revoke Full Authority to Administer the Estate	up was that they didn't know how Shasta
· · · · · · · · · · · · · · · · · · ·	County was going to dispose of the
the Requirement of Bond was filed.	property. Counsel further advises that he
	has the status report ready to be filed and
	anticipates filing the final account within six weeks.
· ·	six weeks.
10/27/12,	1. Need <b>Accounting and Petition for</b>
Inventory & Appraisal filed 01/30/13 -	Final Distribution or current written
	status report pursuant to Local
	Rule 7.5, which states: In all
Status Report filed 08/30/13 states: The	matters set for status hearing,
rejections of Creditor's Claims for creditors	verified status reports must be
	filed no later than 10 days before
	the hearing. Status Reports must
	comply with the applicable code
<u>'</u>	requirements. Notice of the status
· =	hearing, together with a copy of the Status Report shall be served
	on all necessary parties.
	orrain recessary parties.
County Court determines (1) that the parcel	
of real property should pass to this	
decedent, or (2) based upon our previous	
matters regarding the real property in Shasta	Reviewed by: JF
	<b>Reviewed on:</b> 10/04/13
	Updates:
	Recommendation:
	File 13 – Nelson
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	On 10/24/12, an Order Granting Petition to Revoke Full Authority to Administer the Estate and to Grant Limited Authority and Revoke the Requirement of Bond was filed.  Letters of Administration with Limited Authority and without bond were issued on 10/24/12.  Inventory & Appraisal filed 01/30/13 - \$100,543.48.  Status Report filed 08/30/13 states: The rejections of Creditor's Claims for creditors who did not want to negotiate their Claims was completed in April. All Creditors' Claims that were negotiated for a lesser amount were paid and releases have been filed. The Administrator is pursuing a Petition to Determine Succession regarding real property belonging to her grandmother in Shasta County. The conclusion of this estate has been held in abeyance until the Shasta County Court determines (1) that the parcel of real property should pass to this decedent, or (2) based upon our previous

Antuna, Suzie (pro per – daughter/Administrator)
Status Hearing

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Cont. from 051013, 071213, 081613	C
Aff.Sub.Wit.	٨
Verified	fi
Inventory	C
PTC	C
Not.Cred.	†
Notice of	r
Hrg	(
Aff.Mail	r
Aff.Pub.	f
Sp.Ntc.	
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Letters	C
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Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	
Status Rpt	
UCCJEA	
Citation	
FTB Notice	

**SUZIE ANTUNA**, daughter, was appointed Administrator with Full IAEA and without bond on 08/22/12.

**Letters of Administration** were issued on 08/22/12.

Minute Order from status hearing regarding filing of the Inventory & Appraisal dated 01/25/13 set this matter for a Status Hearing and states: Ms. Antuna informs the Court that the Inventory & Appraisal was filed this morning, however, a \$2,000.00 check was not included. Matter set for a Status Hearing on 05/10/13. The Court directs Ms. Antuna to meet with Court Examiner Sarah Campbell forthwith.

Inventory & Apppraisl filed 01/25/13 - \$57,287.66

Supplemental Inventory & Appraisal filed 04/25/13 - \$2,000.00

#### NEEDS/PROBLEMS/COMMENTS:

continuance.

# CONTINUED FROM 08/16/13 Minute Order from 08/16/13 states: Attorney Jennifer Walters informs the Court that she will be representing the petitioner(s). Counsel requests a

As of 10/04/13, nothing further has been filed in this matter:

1. Need Supplemental Inventory & Appraisal and/or current written status report pursuant to Local Rule 7.5, which states: In all matters set for status hearing, verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.

Reviewed by: JF
Reviewed on: 10/04/13
Updates:
Recommendation:
File 14 – Rocha

Hemb, Richard E. (for Michele R. Curley – Administrator)

Status Hearing Re: Filing of the Inventory and Appraisal

DC	D: 09/07/12	MICHELE R. CURLEY, daughter, was	NEEDS/PROBLEMS/COMMENTS:
		appointed Administrator with full IAEA and	
		bond in the amount of \$30,000.00 on	CONTINUED FROM 08/23/13
		11/07/12.	Minute Order from hearing on 08/23/13
	6 0/1/12		states: Counsel informs the Court that
	ont. from 061413, 2313	<b>Letters of Administration</b> were issued on	there is a bank account that has been
U62		01/22/13.	found and he is waiting on some
	Aff.Sub.Wit.	Minute Ouderfrom 04/05/12 and their months of	additional information.
	Verified	Minute Order from 04/05/13 set this matter	As of 10/04/12 modbing further has been
	Inventory X	for status re filing of the Inventory & Appraisal.	As of 10/04/13, nothing further has been filed.
	PTC	Status Conference Statement filed 08/20/13	inou.
	Not.Cred.	states: the Administrator has been working	2. Need <b>Inventory &amp; Appraisal</b> .
	Notice of	with her brother, who has possession of the	· · · ·
	Hrg	real property asset of the estate. The brother	
	Aff.Mail	stopped making payments on the home	
	Aff.Pub.	and the Administrator has started making	
	Sp.Ntc.	payments from her own funds. The	
	Pers.Serv.	mortgage payments on the property are up to date. The Administrator has now	
	Conf.	determined that the sale of the property will	
	Screen	be necessary. The Administrator has	
	Letters	determined that there is one bank account	
	Duties/Supp	that is an estate asset and the only other	
	Objections	assets are the real property and two	
	Video	vehicles. The Administrator is forwarding information to complete the Inventory &	
	Receipt	Appraisal forms to her attorney. It is	
	CI Report	anticipated that the Inventory & Appraisal	
	9202	will be sent to the probate referee within the	
	Order	next two weeks.	
	Aff. Posting		Reviewed by: JF
	Status Rpt		<b>Reviewed on:</b> 10/04/13
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 15 - Martinez

Nuttall, Natalie R. (for Heather Aguirre – Conservator of the Estate)

Status Hearing Re: Filing of the Receipt of Funds in a Blocked Account

Age: 77	HEATHER AGUIRRE, daughter, was	NEEDS/PROBLEMS/COMMENTS:
DOB: 12/17/1936	appointed Conservator of the Estate on	NEEDS/FROBLEMS/COMMIENTS.
DOB. 12/17/1730	04/22/13. Letters of Conservatorship were	Continued from 7/5/2013.
	issued on 04/23/13.	Committee morn 7/3/2013.
	133000 01104/25/15.	
	Order to Deposit Money into Blocked	Need Acknowledgement and
Cont. from 052413, 070513, 082313	Account was filed 04/22/13.	Receipt of Order to Deposit  Money into Blocked Account or
Aff.Sub.Wit.	Minute Order from 04/22/13 set this matter	current written status report
Verified	for hearing re Filing of the	pursuant to Local Rule 7.5 which
Inventory	Acknowledgement and Receipt of Order to	states in all matters set for status
PTC	Deposit Money into Blocked Account.	hearing verified status reports must be filed no later than 10
Not.Cred.	Status Hearing Report filed 7/3/2013 states:	days before the hearing. Status
Notice of	the conservator is currently awaiting the	Reports must comply with the
Hrg	receipt of funds due the conservatorship, as	applicable code requirements.
Aff.Mail	his inheritance from the estate of his brother,	Notice of the status hearing,
Aff.Pub.	Leslie MacMurray. Leslie MacMurray's estate	together with a copy of the Status
Sp.Ntc.	is currently being probated in Massachusetts.  It is anticipated that the check for the	Report shall be served on all necessary parties.
Pers.Serv.	inheritance funds will be received within the	riccossary parities.
Conf.	next one to two weeks, and promptly	
Screen	deposited into a blocked account after	
Letters	which time a Receipt will be filed with the	
Duties/Supp	Court.	
Objections	Ex Parte Order signed on 10/3/13 states the	
Video	amount of the fund conservatee received	
Receipt	for the estate of his deceased brother is	
CI Report	\$307,420.766 and those funds are to be	
9202	placed into a blocked account.	
Order	Order for Blocked Account was signed on	Deviewed by a VT
Aff. Posting	10/3/13 ordering \$307,420.76 to be placed	Reviewed by: KT
Status Rpt UCCJEA	into a blocked account.	Reviewed on: 10/4/13 Updates:
Citation	-	Recommendation:
FTB Notice	-	File 16A - MacMurray
LID MONCE		THE TOA - MUCMUNDY

16A

Nuttall, Natalie R. (for Heather Aguirre – Conservator of the Estate)
Status Hearing Re: Filing of the Inventory and Appraisal

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Age: 77	<b>HEATHER AGUIRRE,</b> daughter, was	NEEDS/PROBLEMS/COMMENTS:
DOB: 12/17/1936	appointed Conservator of the Estate on	
	04/22/13. Letters of Conservatorship were	
	issued on 04/23/13.	2. Need Inventory and Appraisal or
	Alimento Ordon from 04/00/12 and their result on	current written status report
Cont. from 082313	Minute Order from 04/22/13 set this matter for hearing for the filing of the inventory and	pursuant to Local Rule 7.5 which states in all matters set for status
Aff.Sub.Wit.	appraisal.	hearing verified status reports
Verified	арраза.	must be filed no later than 10
Inventory		days before the hearing. Status
PTC		Reports must comply with the
Not.Cred.		applicable code requirements.
Notice of		Notice of the status hearing, together with a copy of the Status
Hrg		Report shall be served on all
Aff.Mail		necessary parties.
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 10/4/2013
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 16B - MacMurray

Mele, James J. (for Curtis James Sigle – Petitioner – Administrator)
Status Hearing Re: Filing of the Inventory and Appraisal

DOB: 03/16/2013  CURTIS JAMES SIGLE, son, was appointed Administrator with full IAEA authority without bond on 05/07/2013.  Cont. from  Aff.Sub.Wit.  Verified  ✓ Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.  Sp.Ntc.	<u>L</u>
Administrator with full IAEA authority without bond on 05/07/2013.    Cont. from	<u>L</u>
bond on 05/07/2013.  Cont. from  Aff.Sub.Wit.  Verified  ✓ Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	<u>L</u>
Cont. from  Aff.Sub.Wit.  Verified  ✓ Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	<u>L</u>
Cont. from  Aff.Sub.Wit.  Verified  ✓ Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	L
Aff.Sub.Wit.  Verified  ✓ Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Pub.	
Verified   ✓ Inventory   PTC   Not.Cred.   Notice of Hrg   Aff.Mail   Aff.Pub.	
✓ Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	
✓ Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	
PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub.	
Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	
Notice of Hrg  Aff.Mail  Aff.Pub.	
Hrg Aff.Mail Aff.Pub.	
Aff.Mail Aff.Pub.	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting Reviewed by: L∨	
Status Rpt Reviewed on: 10/03/2013	
UCCJEA Updates:	
Citation Recommendation:	
FTB Notice File 17 - Sigle	

Atty Ferri, Sabino J.L. (pro per – son/co-Executor)

Atty Ferri, Pasqua Carmela (pro per – daughter/co-Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/23/12	SABINO J.L. FERRI and PASQUA CARMELA	NEEDS/PROBLEMS/COMMENTS:
	FERRI, son & daughter, were appointed as	
	Co-Executors with Full IAEA and without	CONTINUED FROM 09/06/13
	bond on 04/23/13. Letters were issued on	Minute Order from 09/06/13 states: No
Cont. from 090613	04/24/13.	appearances. The Court directs that a copy of the minute order and examiner
Aff.Sub.Wit.	Minute Order from hearing on 04/23/13 set	notes to be sent to Sabino Ferri and
Verified	this matter for status regarding filing of the	Pasqua Ferri. Matter continued to
Inventory	Inventory & Appraisal.	10/11/13. Sabino Ferri and Pasqua Ferri
PTC		are not ordered to be personally present on 10/11/13.
Not.Cred.	1	011 10/11/10.
Notice of		<b>Note:</b> A copy of the minute order dated
Hrg		09/06/13 was mailed to Sabino Ferri &
Aff.Mail		Pasqua Ferri on 09/06/13.
Aff.Pub.		A £ 10 /04 /12
Sp.Ntc.		As of 10/04/13, nothing further has been filed in this matter:
Pers.Serv.		illed iii iiis mailei.
Conf.		1. Need Inventory & Appraisal <u>or</u>
Screen		Status Update report.
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		<b>Reviewed on:</b> 10/04/13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 18 – Ferri